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Wealthtech Weekly

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By Rob Burgess
Reporter

Artificial intelligence tools have been steadily making their way into advisor technology stacks. But what about AI agents? Unlike generative AI, which produces an output based on a prompt, agentic AI uses multiple steps to complete a stated goal. Experts and advisors I spoke with say these can be valuable — with strict guardrails.

Have you begun implementing AI agents in your firm? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

How agentic AI is showing up in advisor workflows

As AI agents move from theory to reality, some advisors are implementing these tools into their technology stacks, but not without human oversight.

- **Humility alone won't win next-gen clients. Here's what else will**
  A new McKinsey report on the future of wealth management identifies a disturbing trend: Younger investors are losing trust in advisors.
- **As private equity reshapes RIAs, advisors look for alternatives**

Private equity-backed M&A activity has steadily risen. Owners may do great in a sale, but what about advisors lower in the organization?

- **Nearly 3 in 4 advisors say their firms invest in career development**
  Nearly two-thirds of advisors surveyed this month said that internal training programs or workshops were offered by their firms.
- **How can RIAs replenish the pipeline for new advisor talent?**
  Over a third of all advisors plan to retire in the next few years, leaving an industry gap tens of thousands short of anticipated demand. How can firms keep up?

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